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P-CARD USER MANUAL

ADDING A PROXY VERIFIER

INTRODUCTION

A proxy verifier is person who can verify transactions in place of the card holder. You can add a new user as a proxy verifier or add proxy card numbers to an existing P-Card user.

TO ADD A NEW PROXY VERIFIER

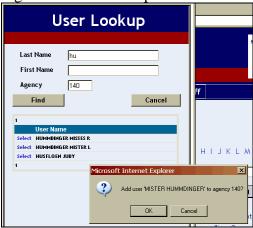
Select Add User.

Figure 1 - Add User



- 2. The **User Lookup** menu will appear. Type the last name of the new user in the **Last Name** field. (You can type the first few letters of a user's name if you are not sure exactly how it is spelled.)
 - a. To add an employee from another agency, type the last and/or first name and enter their agency number in the **Agency** field.
- 3. Click **Find**. If the user cannot be found, contact your payroll administrator to make sure that the user has been added to state payroll records.

Figure 2 - User Lookup

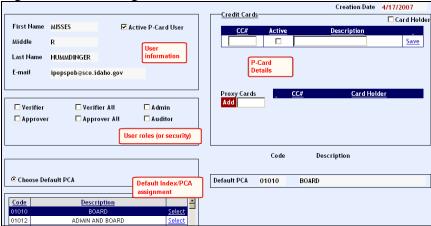


Click **Select** next to the user's name to add and then click **OK** to confirm adding the user.

TO SET UP THE NEW USER AS A PROXY VERIFIER

4. Verify the name and e-mail of the user. If it is not correct, contact your payroll administrator to make sure that the user has been added to state payroll records

Figure 3- User configuration



- 5. Select **Active P-Card User** to give the user access to the P-Card application. NOTE: If a user cannot access to the P-Card application even after you have added them, contact SCO at dsahelpline@sco.idaho.gov.
- 6. Select **Verifier**.
- 7. To add proxy card numbers, enter the last six digits of the card number in the **Proxy Cards** field and click **Add**. The card number and card holder will be displayed for whom the user will be a proxy.
- 8. After the user configuration is complete, click **Save** (on the top menu bar).

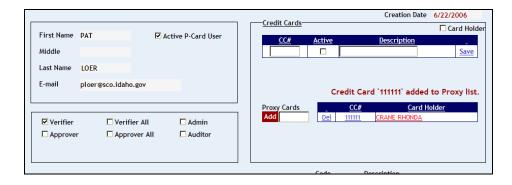
TO ADD AN EXISTING USER AS A PROXY VERIFIER

1. Click the edit icon next to a user's name to update their set up.

Figure 2 - Edit icon



- 2. The user's configuration screen will open.
- 3. To add proxy card numbers, enter the last six digits of the card number in the **Proxy Cards** field and click **Add**. The card number and card holder will be displayed for whom the user will be a proxy.



4. After the user configuration is complete, click **Save** (on the top menu bar).

TO USE MAINTAIN CC TO ADD A PROXY VERIFIER

NOTE: **Maintain CC** assigns existing P-Card users to a card whereas when you add or update an existing user to be a proxy verifier, you assign cards to the user.

1. Click **Maintain CC** on the Administration screen.

Figure 1 - Maintain credit card button



A list of your agency's credit cards and the associated card holder will be displayed. The list can be sorted ascending/descending by clicking the column headings (CC#, Card Holder, etc.) The column headings include:

- CC# the last six digits of the P-Card.
- **Active** Indicates if the card is active in the P-Card application.
- **Description** A description you entered when setting up a new user.
- Card Holder The name of the card holder. A card holder that is inactive in the application is indicated in red. (Missing transactions can often be attributed to users that were made inactive before the transactions were uploaded from MasterCard.) NOTE: If both the card and the card holder are inactive, the card holder name will not be in red.
- 2. Click the card number (CC #) to which you want to assign a proxy verifier.
- 3. Click the down arrow of the **Proxy Verifier** menu and click the name to add.
- 4. Click **Add** to add the proxy verifier to the card.

Figure 2 - Add Proxy Verifier



5. To remove a proxy verifier, click **Del** next to the name.